



Center for Responsible Travel

Transforming the Way the World Travels

The Case for Responsible Travel: Trends and Statistics

International tourist arrivals grew by 5% in 2013, reaching 1.087 billion, up 52 million from 2012. Despite global economic challenges, international tourism results were well above expectations, and the United Nations World Tourism Organization (UNWTO) forecasts a 4% to 4.5% growth in 2014 - again, above the long term projections.¹

International tourism receipts also hit a new record, reaching an estimated US\$ 1.075 billion in 2012, up 4% in real terms, from US \$1042 billion in 2011.² The travel industry contributed 9% of global GDP (US \$6.6 trillion) in 2012 and generated more than 260 million jobs, or 1 in 11 of total jobs. The United States leads the world in revenue from international tourism (US \$165.6 billion in 2012), and is second in international arrivals (66 million in 2012); France ranks first.³

With continuing growth in travel, there is increasing recognition among both travel professionals and consumers of the importance of responsible travel – travel that minimizes negative impacts, brings economic benefits to host communities, and preserves the cultural and natural resources of the destinations. Fortunately for travel businesses and destinations, there is strong evidence that responsible travel is also good for the bottom line.

Tourism Terms

Responsible tourism is one of several closely related terms that are ethically based.

CATEGORY	DEFINITION
Ecotourism	Responsible travel to natural areas that conserves the environment and improves the welfare of local people. ⁴
Geotourism	Tourism that sustains or enhances the geographical character of a place – its environment, heritage, aesthetics, and culture and the well-being of its residents. ⁵
Pro-Poor Tourism	Tourism that results in increased net benefit for the poor people in a destination. ⁶
Responsible Tourism	Tourism that maximizes the benefits to local communities, minimizes negative social or environmental impacts, and helps local people conserve fragile cultures and habitats or species. ⁷
Sustainable Tourism	Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities. Sustainable tourism development guidelines and management practices are applicable to all forms of tourism in all types of destinations, including mass tourism and the various niche tourism segments. ⁸
Ethical Tourism	Tourism in a destination where ethical issues are the key driver, e.g. social injustice, human rights, animal welfare, or the environment. ⁹

Consumer Demand for Responsible Travel

A variety of market studies in recent years have documented sustained interest among consumers in tourism products and services that protect the environment and respect local cultures.

Experts say...

- “Concern about sustainability and the planet is top of mind for everybody... [O]ver 98% of consumers in every market worldwide view themselves as environmentalists.”
—James Canton, CEO, *Institute for Global Futures*, San Francisco.¹⁰
- Environmental concern is “the biggest social trend for the rest of our careers.”
—Daniel Levine, Executive Director, *Avant-Guide Institute*, New York.¹¹
- “Green is no longer just a trend. It’s a way of life.”
—Fran Brasseur, Executive Director, *HSMIAI (Hotel Sales and Marketing Association International) Foundation*¹²

Surveys and Statistics show...

- A 2013 Travel Guard survey of travel agents concluded “green travel is here to stay.” The survey found “24% of those who responded noted that interest in green travel is currently the highest it’s ever been in the last 10 years, and 51% reported that interest has remained constant throughout this time period.”¹³
- 79% of travelers globally “think that it’s important that accommodation providers have eco-friendly practices,” according to a 2012-2013 TripAdvisor survey.¹⁴
- A 2013 TripAdvisor.com survey of 1,300 U.S. travelers shows that nearly two-thirds “often” or “always” consider the environment when choosing hotels, transportation and meals.¹⁵
- 67% of U.S. consumers are now “looking for ‘greener’ products,” according to the 2012 study by MIT Sloan Management Review.¹⁶
- 50% of global consumers are willing to pay more for goods and services from companies that have implemented programs to give back to society, according to a 2013 Nielsen Global Survey on Corporate Social Responsibility poll of more than 29,000 online consumers in 58 countries. This represents a 5% increase over a similar poll in 2011.¹⁷
- “Tourist choices are increasingly influenced by sustainability considerations,” states the World Tourism Organization’s (UNWTO) 2012 *Tourism in the Green Economy Report*. Ecotourism, nature, heritage, cultural and “soft adventure” tourism are predicted to grow rapidly over the next two decades, and global spending on ecotourism is expected to increase at a higher rate than the tourism industry as a whole.¹⁸

- “A significant number of international travelers seek out nature- and culture-based experiences, such as visiting historic sites (40 percent of overseas travelers), cultural sites (23 percent) and national parks (20 percent),” according to the U.S. government’s 2012 *National Travel & Tourism Strategy*.¹⁹
- The 2012 *National Travel & Tourism Strategy* found similar trends among Americans traveling abroad: “Nature-based, culture-based, heritage and outdoor adventure travel represent a significant segment of the outbound tourism market as well.”²⁰
- Surveys and studies “consistently find that between 10% and 15% of discretionary travelers want the unusual,” states a 2011 study by the World Tourism Organization (UNWTO). These are the “alternative” or “new tourists” and “growth from these groups is out-speeding that of mainstream segments.” These tourists are “typically highly educated, mature, affluent, well traveled, environmentally aware and sensitive to the social and cultural traditions, systems and mores of the destinations they visit.”²¹
- More than 90% of U.S. travelers surveyed by the online travel publisher TravelZoo in 2010 said that they would choose a ‘green,’ environmentally conscious hotel if the price and amenities were comparable to those at a non-sustainable, non-green hotel.²²
- The 2010 *TUI Travel Sustainability Survey* of almost 4000 holidaymakers in seven European countries and the U.S., found that “the most interesting sustainability issues” are: pollution issues (71%), biodiversity and animal protection (64%), climate change and carbon emissions (63%), fair trade and labor standards (62%), and social and community issues (61%).²³
- 93% of Conde Nast Traveler readers surveyed in 2011 said that travel companies should be responsible for protecting the environment, and 58% said their hotel choice is influenced by the support the hotel gives to the local community.²⁴
- 47% of business travelers prefer staying in a green-certified hotel, according to Timetric’s Global Business Traveler Survey 2013.²⁵
- 95% of business travelers surveyed believe the hotel industry should be undertaking ‘green’ initiatives, and sustainability will become a defining issue for the hospitality industry in 2015 and beyond, according to Deloitte’s Hospitality 2015 report.²⁶
- In 2012, 35% of adults said they would like to try a holiday involving a voluntourism component, and 6% said they had already done so.²⁷
- A 2012 Four Seasons survey of luxury travel trends observed:
 - **“Conscientious spending replaces conspicuous consumption.** The affluent put much more thought into their purchasing decisions to determine whether a product or service will intrinsically improve their lives.”
 - **“Money can buy time and experiences.** The strongest contributor to happiness for the time-strapped wealthy is moments spent with loved ones.”²⁸

- U.S. consumers who are focused on health and fitness, the environment, personal development, sustainable living and social justice (known as conscientious consumers) number 41 million people, or 19% of U.S. adults, according to a 2012 study by the non-profit organization LOHAS (Lifestyles Of Health And Sustainability). Conscientious travelers are part of this “LOHAS pool.”²⁹
- **Growth of conscientious travelers** is being driven by a confluence of lifestyle trends that suggest that the demand for responsible tourism is likely to remain strong into the future.³⁰ These trends include:
 - **Emergence of experiential tourism.** In 2001, the UNWTO identified “experiential” tourism (which encompasses ecotourism, nature, heritage, cultural, soft adventure tourism, rural and community tourism) as among the sectors expected to grow most quickly during the coming two decades.³¹ Experiential tourism involves active participation by travelers in the experience and promotes activities that draw people outdoors, and into cultures and communities. In this sense it is very personal and individual. Essentially, experiential tourists seek memorable experiences.³²
 - **Generational shifts.** Members of the “Baby Boom” generation (those born between 1946–1964) are entering retirement and are finding themselves with more leisure time. Numbering almost 80 million, Baby Boomers control 70% to 80% of the wealth, live longer, value more active lifestyles including long-haul travel, and are increasingly aware of environmental issues. In addition, the “Gen-Xers” (the generation born between 1961–1981) are environmentally conscious and have embraced conscientious consumerism or “spending your way to a greener planet.” The “Gen-Yers” or “Millennials” (children of Baby Boomers born between early 1980s-2001) are generally well-informed, electronically savvy, like personal attention, and are passionate about environmental and social justice issues.

Each generation influences the others and together they are driving demand for responsible tourism.

- **Need to connect with nature.** By 2010, half of the world population was living in cities, for the first time in human history. In response, urban workers are seeking to spend their leisure time in areas where they can ‘reconnect with nature.’ Hiking, camping, wildlife viewing, snorkeling and SCUBA holidays (all trending upward) offer a chance to escape from urban environments and busy work lives. Some urbanites, particularly younger ones, turn to active outdoor adventure travel to meet the need to reconnect with nature while maintaining their fast-paced lifestyle.
- **Demand for authenticity.** Modern consumers want authentic experiences. According to the UNWTO, “The postmodern consumer’s search for experiences that are engaging, personable, memorable – and above all authentic is especially strong in respect of tourism.”³³
- **Togetherness.** Families are taking three-generation journeys, with grandparents, parents, and children taking holidays together. They want to enjoy and spend time with one another, but also to have the opportunity to each do different things. They seek holidays offering a range of activities.
- **Search for fulfillment.** As Baby Boomers, Gen-Xers, and Millennials or Gen-Yers seek authentic, ‘green’ experiences as an escape from the stress of urban life, they are also increasingly searching for deeper meaning in their vacation experiences. This has led to a tremendous growth in both “volunteer” tourism (“voluntourism”)³⁴ and travelers’ philanthropy³⁵ programs, where travelers donate time, money, or goods to support worthy projects in the host destination. Opportunities for personal growth and fulfillment are a value-added component of leisure holidays, and responsible tourism is growing as providers recognize this growing demand.



Camp Okuti, The Okavango Delta, Botswana
Courtesy of famous.destination.com

The Business Case for Responsible Tourism

Within the last few years, sustainability has become much more mainstream within the tourism industry, with increasing numbers of businesses creating environmental departments, adopting environmental and social good practices, seeking certification, and looking at ways to ‘green’ their supply chain.

Experts say...

- “IHG views sustainability as a business issue and it is core to the company’s five year strategic plan.”
—David Jerome, Sr. Vice President, Social Corporate Responsibility, InterContinental Hotel Group³⁶

- “Sustainability is one of our top five strategic priorities because it impacts our business and reflects our core values.”

—Faith Taylor, Corporate Vice President, Sustainability & Innovation, Wyndham Worldwide³⁷

- “As market leader, it is incumbent on us to pioneer sustainability change in our sector – a challenge we embrace, in the knowledge that success is critical to the future health of our business and of the industry.”

—Peter Long, Chief Executive, TUI Travel³⁸

- “Sustainability is not only the right thing to do, but it simply makes good business sense, and will remain central to how we manage our operations.”

—Constantinos Victoras, Area Operations Manager, Atlantica Hotels & Resorts³⁹

- “When it comes right down to it, sustainability pays. And it pays in three ways: guests are increasingly interested, so it’s good for business; there are real opportunities to reduce costs and do things that are ‘green’ at the same time; and something not everybody realizes, there is so much passion and energy within the organization to do this that the ability to get people excited about the company they’re a part of through the kinds of green practices we’ve been implementing is another source of success and payoff.”

—Frits van Paasschen, CEO, Starwood⁴⁰

Surveys and Statistics show...

- 85% of U.S. hoteliers indicate that they currently have green practices in place, according to a 2013 study by TripAdvisor.⁴¹
- A 2013 Conference Board survey of over 120 multinational corporations in Europe and the US found that 73% identified “integrating sustainability into their corporate strategy as a top priority for their executive leadership team.”⁴²
- A 2012 report by The Travel Foundation and Forum for the Future states, “Today’s consumers expect travel companies to build sustainability into their product offer. A majority of 70% believe companies should be committed to preserving the natural environment and 55% fair working conditions, while 75% of consumers want a more responsible holiday, and 66% would like to identify a greener holiday easily. To match these expectations, 84% of those working in marketing & PR management see green credentials becoming increasingly important as environmental issues move to the forefront of customers’ minds.” This report identifies 6 key benefits travel businesses will gain by adopting responsible practices:
 - (a) Reduce costs and improve efficiencies.
 - (b) Manage risks and meet emerging legal and regulatory requirements.
 - (c) Engage staff in CSR, which has proven to be a key driver of employee satisfaction.

- (d) Gain competitive advantage by offering differentiating experiences to customers.

- (e) Meet emerging consumer trends.

- (f) Protect your business, by protecting the environment on which it depends.⁴³

- A groundbreaking 2011 study by the Harvard Business School showed that companies that adopted environmental, social, and governance policies in the 1990s outperformed those that did not. The evidence from a detailed comparison of 90 “high sustainability” companies and 90 “low sustainability” or traditional companies “suggests that sustainable firms are not adopting environmental and social policies purely for public relations reasons. Adoption of these policies is not just cheap talk; rather these policies reflect substantive changes in business processes.”⁴⁴

- 65% of corporate travel executives responsible for more than \$10 million in annual travel budgets are in various stages of implementing ‘green’ business-travel guidelines, according to a 2011 survey of Association of Corporate Travel Planners members.⁴⁵

- 72% of meeting planners say they have ‘green’ policies in place for at least some of their meetings, and 19% say they have such policies for all meetings, according to a 2013 survey of *Successful Meetings* readers. In addition, 73% of planners say sustainable policies and procedures have some or a great deal of influence on the hotel they chose.⁴⁶

- The US hospitality industry spends over \$7.5 billion on energy each year. Reducing energy use by 10% would result in approximately \$750 million in annual savings.⁴⁷

- Some specific examples of businesses demonstrating the economic and strategic benefits of sustainability:

- (a) Many leading hoteliers have created senior management positions in sustainability, recognizing its importance to their business. Examples include: Marriott, Hilton, IHG, Fairmont, Wyndham, Accor and Kimpton, among hoteliers, as well as Royal Caribbean Cruise Lines, TUI Travel, and Vail Resorts.

- (b) Marriott International has developed a ‘green’ hotel prototype pre-certified by the U.S. Green Building Council as part of its LEED Volume Program. This prototype saves Marriott’s hotel owners an average of \$100,000 in development costs, six months in design time, and up to 25% in terms of energy and water consumption.⁴⁸

- (c) In 2013, TUI Travel took 3.8 million customers to hotels with sustainability facilities, featured over 1,200 hotels with sustainability certifications, and reduced average per passenger carbon emissions by 9.3%. 94% of their aircraft are now fitted with fuel-saving blended winglets, reducing fuel burn by up to 5%.⁴⁹

(d) The Loews Philadelphia Hotel increased its Energy Star score by 16 points and reduced energy use by over 13% in 3 years by implementing improvements to its HVAC, lightening and water systems.⁵⁰

(e) The Willard Intercontinental Hotel in Washington, DC, documented over \$1,000,000 of new business in 2011 as a direct result of its sustainability initiatives. The additional business came from guests, meeting planners, and wedding parties who said they chose the hotel because of its 'green' initiatives.⁵¹

The Destination Case for Responsible Tourism

In recent years, increasing attention has been focused on protecting and enhancing environmental and social sustainability within entire tourism destinations, and not simply within individual businesses. Tools for measuring and criteria for certifying 'green' destinations are gradually being developed, including by UNWTO, European Union, National Geographic's Geotourism Program, Ethical Traveler, EarthCheck, Green Globe, and Sustainable Travel International's STEP program. In November 2013, the Global Sustainable Tourism Council (GSTC) released its Criteria for Destinations, (GSTC-D) which represents a common understanding of what are the minimum requirements for a sustainable destination.

Experts say...

- "Tourism can do a great deal of good in destinations – whether it be by bringing economic benefits to local communities; helping with conservation efforts or in placing a value on aspects of cultural heritage."

—Sir Ranulph Fiennes, *Veteran British Explorer*⁵²

- "Sustainable tourism is simply about good business practice – protecting the resources the industry depends on to ensure companies can continue selling holidays and destinations continue to thrive, long into the future."

—Sue Hurdle, *Special Advisor, The Travel Foundation*⁵³

- "In the end it's all about protecting our product. If the product – our destinations – aren't protected in environmental and social terms then people won't want to visit them, it is as simple as that."

—John De Vial, *head of Financial Protection, ABTA*⁵⁴

- "It's incredibly encouraging to see the strides [that] ethical destinations are making in the areas of social and ecological wellness."

—Natalie Lefevre, *Ethical Traveler*⁵⁵

Surveys and Statistics show...

- In 2013, Condé Nast Traveler ranked Switzerland and Okavango Delta in Botswana as the best sustainable destinations among developed and developing countries respectively.⁵⁶

- In 2011, Barcelona was awarded the first Biosphere World Class Sustainable Destination certification by the Responsible Tourism Institute, granting it the title of the first city in the world to be a certified sustainable urban destination.⁵⁷

- According to the April 2013 *Travel Guard Update*, a whopping 49% of travel agents named Costa Rica as the most popular destination among clients, followed by South Africa (12%), the Galapagos Islands (8%), Peru (7%) and Belize (6%).⁵⁸

- "Destinations are threatened by climate change impacts, extreme weather, water scarcity, unprecedented rates of biodiversity loss, disease and growing poverty and inequality... Sustainable tourism addresses the challenges head on, by protecting destinations at the same time as enhancing brand value, increasing profits, saving costs and improving competitive positioning, both for attracting and retaining customers and recruiting the best talent," according to the 2012 study by The Travel Foundation and Forum for the Future.⁵⁹

- About half the U.S. states have voluntary 'green' lodging certification programs, most focused on environmental efficiencies. In several states, including Florida and California, state employers are encouraged to use certified hotels when on state business.

- "The buildup of consumers' socio-environmental awareness of tourism development," states the UNWTO, "is leading to increased scrutiny on the part of the public in destination decision-making and a growing requirement for new tourism developments to be sustainable."⁶⁰



Cusco, Peru: A GSTC Sustainable Destination
Courtesy of CW Adventures

- The 2012 TripAdvisor survey found that travelers rank the “top 3 eco-friendly” U.S. cities as Portland, Oregon, San Francisco, and Seattle, Washington.⁶¹
- In 2011, *Condé Nast Traveler* ranked Charleston, South Carolina as the “Top U.S. City” based on its annual Readers’ Choice survey. In the previous 14 Readers’ Choice surveys (1997-2010), Charleston was ranked in the top five cities. The city’s well-regulated, overnight tourism centered on its historic homes, buildings, and culture attracts four million annual visitors and generates more than \$3 billion in annual revenue.⁶²
- Regarding “the overall issue of who is responsible for protecting the destination as a tourism product, a more holistic approach is now emerging – the idea of destination partnerships. Rather than any one party being responsible for protecting a destination, this is a multi-stakeholder approach whereby all parties interested in a destination as a resource look at how they can work together to achieve a common goal of sustainability.”⁶³
- Between 1986 when ecotourism began to take off in Costa Rica and 2007, tourist arrivals increased 7-fold while tourism revenue increased 14-fold. Therefore, as Costa Rica grew to become a leading ecotourism destination, it doubled its earnings/ tourists.⁶⁴
- The Botswana Tourism Organization has employed a ‘low-volume – high-yield’ destination management strategy in the Okavango Delta region to generate high levels of employment, income, and tax revenue while also protecting wild lands and threatened species. Approximately 34% of the adult population in the region now works in tourism, supporting livelihoods and contributing to the conservation of fragile habitats and threatened species.⁶⁵
- In Namibia, the combination of low impact luxury lodges and big-game safaris have been successful at drawing international visitors. Wildlife has more than doubled because villagers have become partners in the ecotourism venture and now value and protect their habitat.⁶⁶
- “To satisfy the definition of sustainable tourism, destinations must take an interdisciplinary, holistic and integrative approach which includes four main objectives: to (i) demonstrate sustainable destination management; (ii) maximize social and economic benefits for the host community and minimize negative impacts; (iii) maximize benefits to communities, visitors, and cultural heritage and minimize impacts; and (iv) maximize benefits to the environment and minimize negative impacts,” according to the 2013 Global Sustainable Tourism Criteria for Destinations.⁶⁷

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This report has been prepared in collaboration with the following tourism organizations:



<http://www2.unwto.org/>



<http://www.gstcouncil.org/>



<https://www.onecaribbean.org/>



<http://www.iipt.org/>



<http://business.gwu.edu/iits/>



<http://www.rainforest-alliance.org/>
<http://www.sustainabletrip.org/>



<http://www.tourismcares.org/>



<http://sustainabletravel.org/>



<http://www.ecotourism.org/>



<http://www.thetravelfoundation.org.uk/>



www.responsibletavel.org



<https://www.facebook.com/CRESTravel>



<https://twitter.com/CRESTResTravel>

ENDNOTES

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There are a number of definitions surrounding Sustainable Tourism. The Caribbean Tourism Organization (CTO) states, "Sustainable tourism development means the optimal use of social, natural, cultural and financial resources for national development on an equitable and self-sustaining basis to provide a unique visitor experience and an improved quality of life through partnerships among government, the private sector and communities". <https://www.onecaribbean.org/our-work/sustainable-tourism-development/>.
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